



LMS for Managers

Overview

The Milwaukee County Training and Development Center is the new cloud-based Learning Management System (LMS) for Milwaukee County. The LMS will allow you to track your or your direct reports' training, register for classes, complete online courses, add external training, and run reports. This handout will cover the following topics:

- [Viewing Your Team](#)
- [Viewing Employee Transcripts](#)
- [Assigning Training](#)
- [Approving and Denying Training](#)
- [Viewing Dashboards](#)
- [Viewing Reports](#)

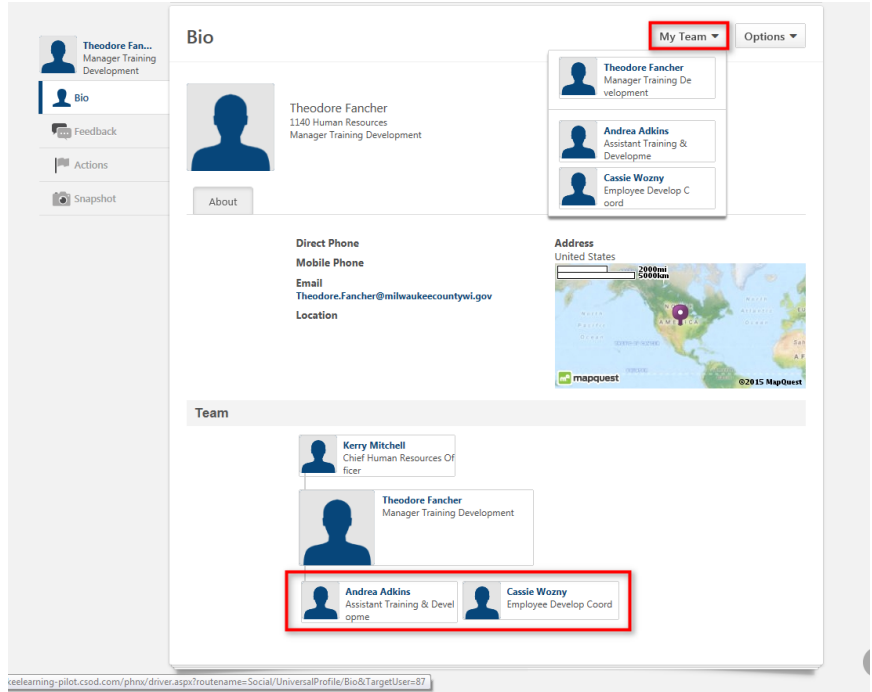
Viewing Your Team

To view your team, including your universal profile, please complete the following steps:

Step	Action
1	<p>Click My Team on the Main Menu.</p>  <p>Result: Your universal bio page will display.</p>



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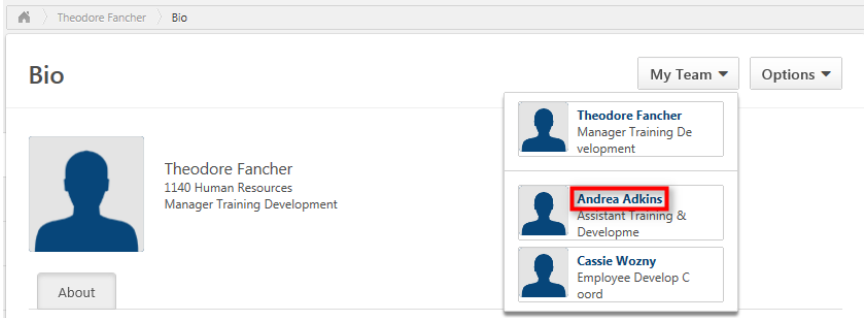
Step	Action
2	<p>Scroll down to see the employees that are part of your team, or click the My Team button in the upper right-hand corner of the page.</p>  <p>The screenshot displays a user profile for Theodore Fancher, Manager Training Development. The profile includes a bio, contact information (Direct Phone, Mobile Phone, Email, Location), and a map of the United States. A "My Team" button is highlighted in the upper right corner. Below the profile, a list of team members is shown, including Kerry Mitchell, Theodore Fancher, Andrea Adkins, and Cassie Wozny. The names of Andrea Adkins and Cassie Wozny are highlighted with a red box.</p> <p>Note: You can take actions on your direct reports by clicking on their names, as you will see in the next section.</p>



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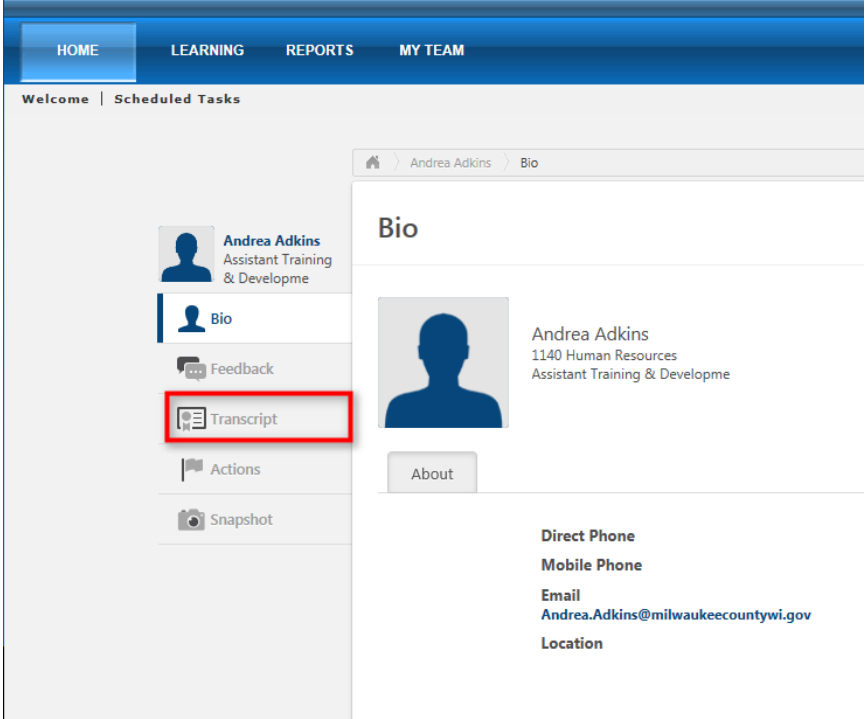
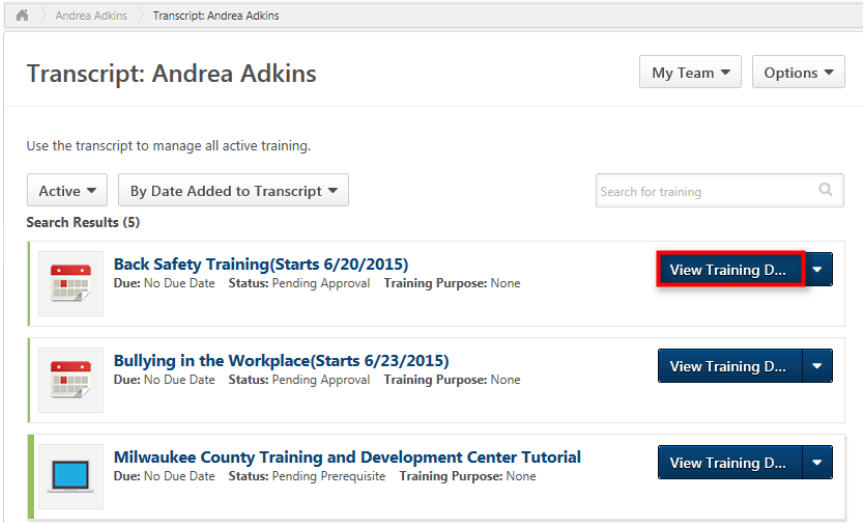
Viewing Employee Transcripts

To view the transcripts of your direct reports, complete the following steps:

Step	Action
1	<p>Click My Team on the Main Menu.</p>  <p>Result: Your universal bio page will display.</p>
2	<p>Click the name of the direct report whose transcript you would like to view.</p>  <p>Result: Your direct report's bio page will display.</p>



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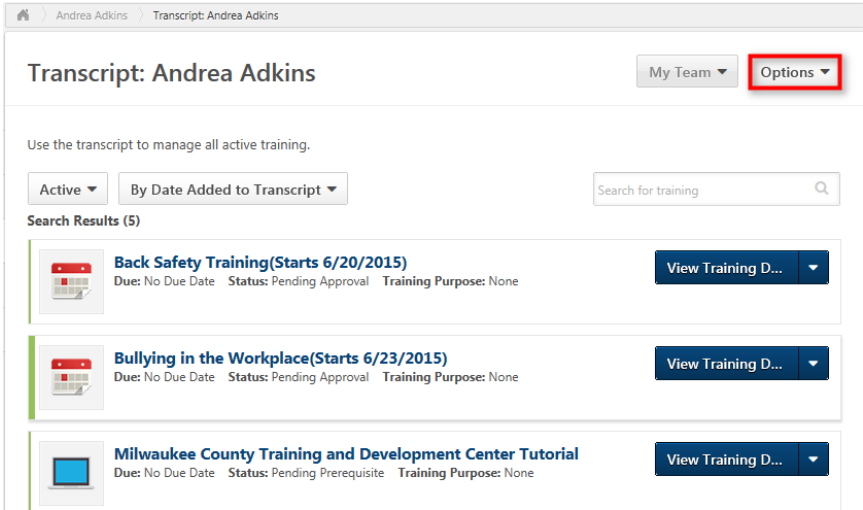
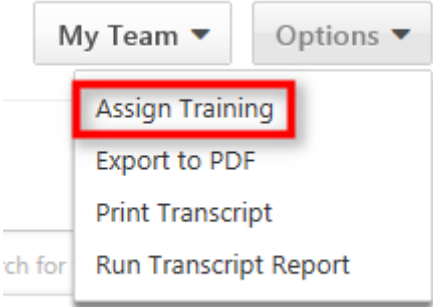
Step	Action
3	<p>Click the Transcript link to the left of your direct report's bio.</p> <div></div> <p>Result: Your direct report's transcript will display.</p> <div></div> <p>Note: You can view details by clicking the View Training Details button to the right of each learning object.</p>



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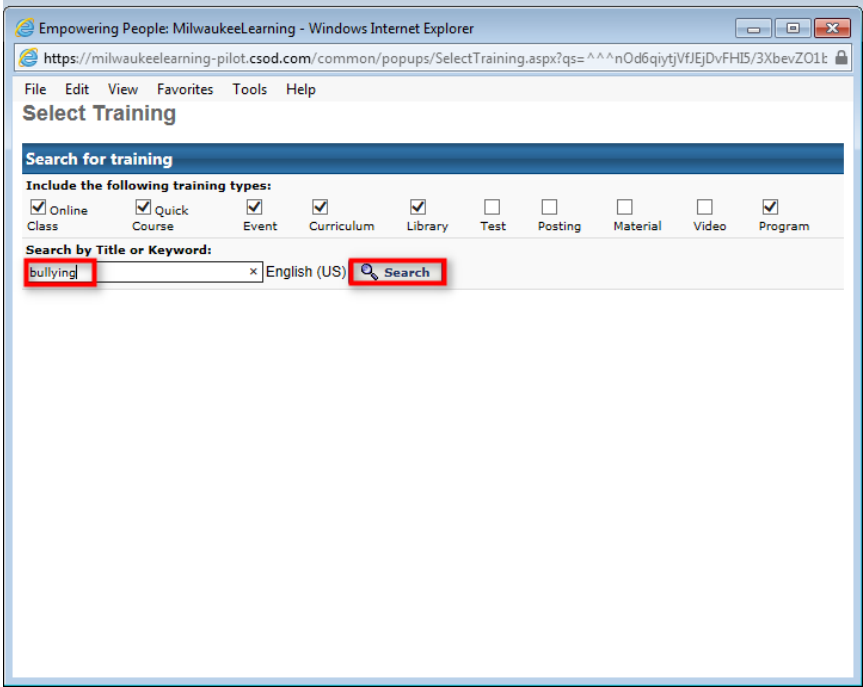
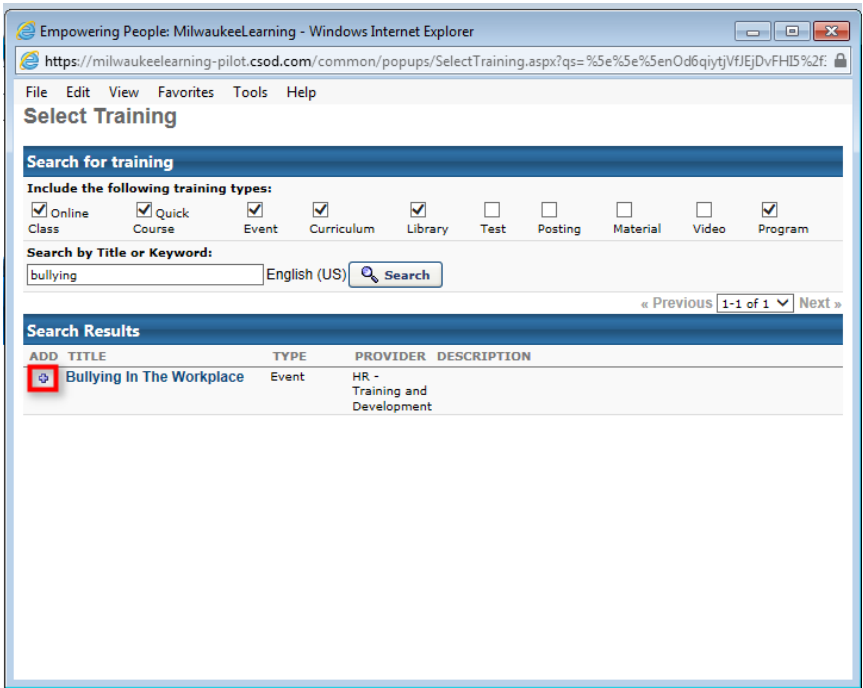
Assigning Training

To assign training to your employee, please complete the following steps:

Step	Action
1	<p>On the My Team page, click the Options button.</p>  <p>The screenshot shows the 'Transcript: Andrea Adkins' page. At the top right, there are two buttons: 'My Team' and 'Options'. The 'Options' button is highlighted with a red rectangular box. Below the buttons, there is a search bar and a list of training results. The first two results are 'Back Safety Training(Starts 6/20/2015)' and 'Bullying in the Workplace(Starts 6/23/2015)'. The third result is 'Milwaukee County Training and Development Center Tutorial'. Each result has a 'View Training D...' button.</p>
2	<p>Click Assign Training from the drop-down menu.</p>  <p>The screenshot shows the 'Options' dropdown menu. The 'Assign Training' option is highlighted with a red rectangular box. Other options in the menu include 'Export to PDF', 'Print Transcript', and 'Run Transcript Report'.</p>



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Step	Action
3	<p>Type in the name of the training for which you are looking and then click the Search button, or click the Search button to see all available training.</p> 
4	<p>When you find the training you want to assign, click the blue plus sign to the left of the title.</p> 



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Step

Action

5

If this is for classroom training with multiple sessions, you will need to first select a session by clicking the **Select Session** button.

Assign Training

Bullying in the Workplace

Event · HR · Training and Development · 6 hours

Select Session

Due Date

Add a Comment

☐ Automatically register users

ⓘ

Users who have the training already in their transcript are not included in this assignment

<input type="checkbox"/>	Direct Reports	Language Equivalency	Assignment History	Current Status	Include subordinates
<input type="checkbox"/>	<div><div></div><div>Andrea Adkins</div></div>		1	Pending Approval	
<input type="checkbox"/>	<div><div></div><div>Cassie Wozny</div></div>		0	None	

Select an Indirect Report

Select a User from a Cost Center I Approve

6

From the drop-down menu to the right of the **Request** button to the rest of the session you want to assign, click **Assign**.

Bullying in the Workplace

Event · HR · Training and Development · 6 hours

Request

Assign

Available Languages

English (US)

Subjects

Human Resources

Event Number

HR-BullyingintheWorkplace

Sessions

Available











View Full Calendar

Available Sessions (1)	Available / Waitlist	Actions
<div><div><div><div><div></div><div>Session Details</div><div>Session · HR · Training and Development · 1 hour</div><div>Courthouse</div><div><div>Starts</div><div>6/23/2015 - 9:00 AM</div></div><div><div>Ends</div><div>6/23/2015 - 10:00 AM</div></div><div>English (US)</div></div></div></div></div>	10/0	<div><div>Request</div><div></div><div>Request</div><div>Assign</div></div>

Notify me of new sessions



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Step	Action									
7	<p>You can either click the checkbox to the left of each direct report to whom you want to assign this training, or you can click the checkbox to the left of Direct Reports to assign it to all of your direct reports.</p> <div><div> Users who have the training already in their transcript</div><table><tr><td><input type="checkbox"/></td><td>Direct Reports</td><td>Language</td></tr><tr><td><input type="checkbox"/></td><td> Andrea Adkins</td><td></td></tr><tr><td><input type="checkbox"/></td><td> Cassie Wozny</td><td></td></tr></table></div> <p>Note: Your direct report(s) will receive an email regarding the assignment of training.</p>	<input type="checkbox"/>	Direct Reports	Language	<input type="checkbox"/>	 Andrea Adkins		<input type="checkbox"/>	 Cassie Wozny	
<input type="checkbox"/>	Direct Reports	Language								
<input type="checkbox"/>	 Andrea Adkins									
<input type="checkbox"/>	 Cassie Wozny									
8	<p>Click the Submit button to finish assigning the training.</p> <div><div><input checked="" type="checkbox"/>  Cassie Wozny</div><div></div><div>0</div><div>None</div><div></div></div> <div><div>Select an Indirect Report </div><div>Select a User from a Cost Center I Approve </div></div> <table><tr><td>Indirect Reports</td><td>Language Equivalency</td><td>Assignment History</td><td>Current Status</td></tr></table> <div><div>Cancel</div><div>Submit</div></div> <p>Note: If the training is an online course or another type of learning object that does not require a session, you can just skip Steps 5 and 6.</p>	Indirect Reports	Language Equivalency	Assignment History	Current Status					
Indirect Reports	Language Equivalency	Assignment History	Current Status							

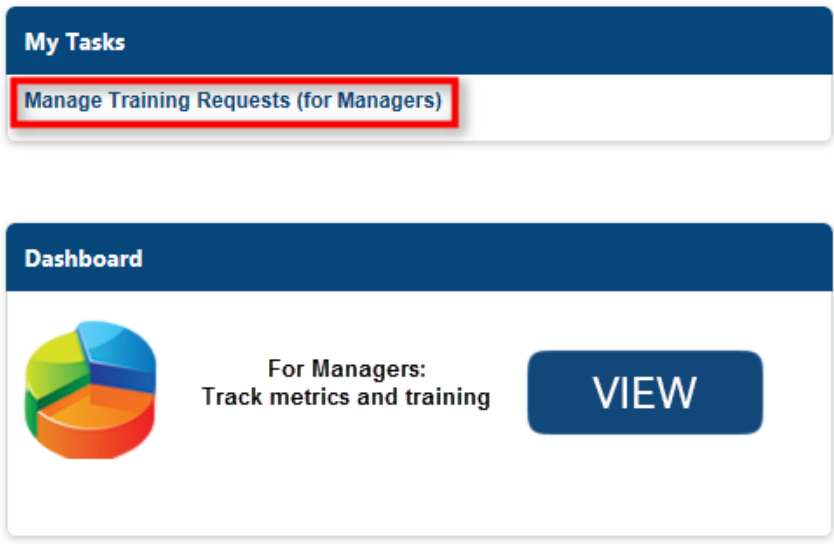


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Approving and Denying Training



Your direct reports can request training. For most instructor-led training courses and some online courses, you will need to approve the request before your direct report can register for or attend training.

When there is a training request, you will receive an email directing you to log into the LMS and approve or deny the request. To approve or deny training requests, complete the following steps:

Step	Action
1	<p>On the Welcome Page, you can click the Manage Training Requests (for Managers) link in the My Tasks widget.</p>  <p>Another way to access it is on the Main Menu. Click My Team and then Manage Employee Learning below it, and then click Manage Pending Requests.</p> <p>Result: The View Pending Requests page will display.</p>



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Step	Action						
2	<p>If there are any pending requests, you will see the requests, with your employee's name to the left, followed by the name of and information about the course, and finally a green checkmark and a red x under Options.</p> 						
3	<p>Determine if you are going to approve or deny training, usually based on coverage, purpose, and necessity.</p> <table border="1"> <thead> <tr> <th>If...</th><th>Then</th></tr> </thead> <tbody> <tr> <td>You want to approve the training request</td><td>Continue to the next step.</td></tr> <tr> <td>You want to deny the training request</td><td>Skip to Step 7.</td></tr> </tbody> </table>	If...	Then	You want to approve the training request	Continue to the next step.	You want to deny the training request	Skip to Step 7.
If...	Then						
You want to approve the training request	Continue to the next step.						
You want to deny the training request	Skip to Step 7.						
4	<p>To approve the request, click the green checkmark to the right of the course request you want to approve.</p>  <p>Result: The Approve Request page will display.</p>						



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Step	Action
5	<p>You can enter a comment if you wish in the text field, but to complete the approval, click the Submit button.</p> <p>Approve Request</p> <p>Please enter any additional comments:</p> <div><div></div></div> <p>By selecting "Employee Pays" you are requesting that the employee be allowed to take t</p> <div><div>Cancel</div><div>Submit</div></div> <p>Result: The request will disappear from the page, and your direct report will receive an email letting him/her know that the request has been approved.</p>
6	<p>To deny the request, click the red x to the right of the course request you want to deny.</p> <div><div>(3 Results)</div><div>Options</div><div><div>✓</div><div>✗</div></div></div>



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Step	Action
7	<p>You can enter a comment in the field. For example, you can suggest another quarter or month, another class, or another session. You can also leave this field blank. Then click the Submit button.</p> <p>Deny Request</p> <p>Please enter any additional comments:</p> <div><p>Please re-request this course in Q4.</p></div> <div><input type="button" value="Cancel"/> <input type="button" value="Submit"/></div> <p>Result: The request will disappear from the page, and your direct report will receive an email letting him/her know that the request has been denied.</p>



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Viewing Dashboards

In addition to viewing individual transcripts, you can also view pre-configured dashboards. To view a dashboard, complete the following steps:

Step	Action
1	<p>Scroll down on the Welcome Page and click the View button in the Dashboard widget.</p> <div><div>Dashboard</div><div><div>For Managers: Track metrics and training</div><div>VIEW</div></div></div> <p>Result: The Employee Training Progress Pie Chart will display.</p>
2	<p>Click the drop-down arrow to the right of the title.</p> <div><div>Training Report</div><div>Options ▾</div><div><div>TRAINING</div><div></div><div>Last refreshed 8/3/2015 8:52 AM</div></div></div>



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Step

3

Action

Click the **View Details** link.

Training Report

TRAINING

View Details

Refresh

Requested: 20.0 %

Completed: 55.0 %

Registered: 25.0 %

Last refreshed 6/3/2015 8:52 AM

Result: You will see additional details regarding the training progress for your direct reports.

Employee Training Progress Summary

Registered/Not Started

Completed

Requested/Not Registered

25.0%

44.0%

25.0%


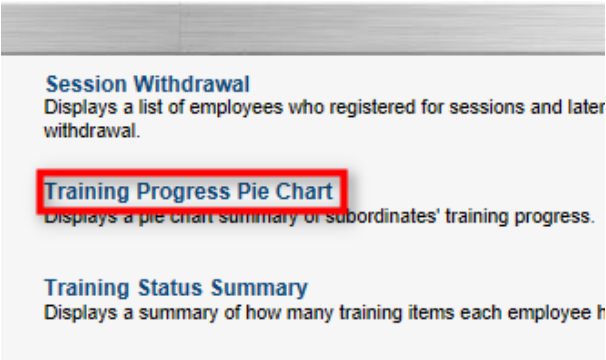
USER ID	USER	TYPE	TITLE	TRAINING PROVIDER	STATUS
120828	Wozny, Cassie	Online Class	Storyline Trial SCORM 1.2	County of Milwaukee, WI	Pending Acknowledgement
120835	Wozny, Cassie	Event	Courageous Dialogue	Milwaukee County Leadership Excellence Approved	Registered
120828	Wozny, Cassie	Online Class	Accident Investigation with Storyline	County of Milwaukee, WI	Completed
120828	Wozny, Cassie	Online Class	Hybrid Vehicle Safety - Agile	County of Milwaukee, WI	Completed
120835	Wozny, Cassie	Session	Resilient Leadership - Agile	Human Resources	Registered
120828	Wozny, Cassie	Session	CharterPoint Online Training	Learning Admin Test Vendor	Registered
120835	Wozny, Cassie	Online Class	Storyline Trial 4	County of Milwaukee, WI	Completed
120828	Wozny, Cassie	Curriculum	New Hire 2	Human Resources	Approved
120835	Wozny, Cassie	Event	Employee Safety 2	Milwaukee County Leadership Excellence Approved	Registered
120828	Wozny, Cassie	Online Class	Emergency Action Plan - Agile	County of Milwaukee, WI	Completed
120828	Wozny, Cassie	Online Class	Storyline SCORM Training 2	County of Milwaukee, WI	Registered
142371	Adkins, Andrea	Online Class	Storyline SCORM Training 3	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Online Class	Emergency Action Plan - Agile	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Event	Employee Safety 2	Milwaukee County Leadership Excellence Approved	Registered
142371	Adkins, Andrea	Curriculum	New Hire 2	Human Resources	Registered
142371	Adkins, Andrea	Session	New Employee Orientation	Human Resources	Pending Approval
142371	Adkins, Andrea	Online Class	Storyline Trial 4	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Material	Titan CMS Staff Training Guide	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Online Class	GIS Hazard Communication - Agile	County of Milwaukee, WI	Registered
142371	Adkins, Andrea	Online Class	Resilient Leadership with Storyline	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Event	Courageous Dialogue	Milwaukee County Leadership Excellence Approved	Registered
142371	Adkins, Andrea	Online Class	Storyline Trial SCORM 1.2	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Session	Harassment Awareness	Human Resources	Approved
142371	Adkins, Andrea	Online Class	Protect Your Back - Agile	County of Milwaukee, WI	Completed
142371	Adkins, Andrea	Session	Conflict Management	Milwaukee County Leadership Excellence Approved	Registered



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Viewing Reports

To view additional training reports, complete the following steps:

Step	Action
1	<p>On the Main Menu, click Reports and then Standard Reports below it.</p>  <p>Result: The Reports page will display. In this example we are going to use the Training Progress Pie Chart report.</p>
2	<p>Click the title of the report you want to run.</p> 

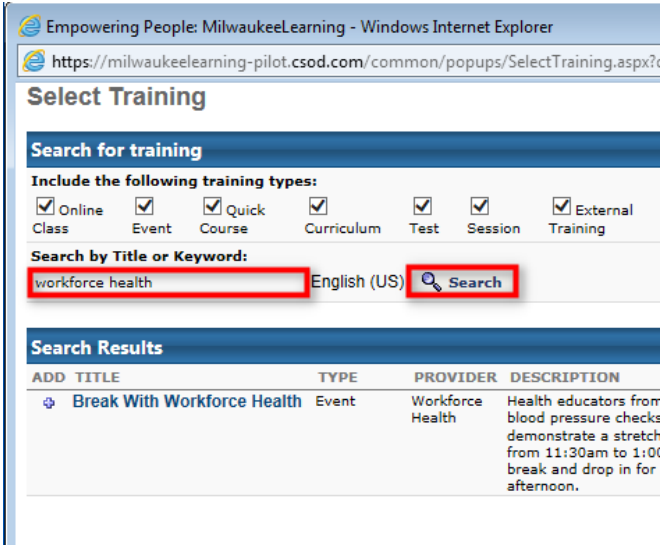
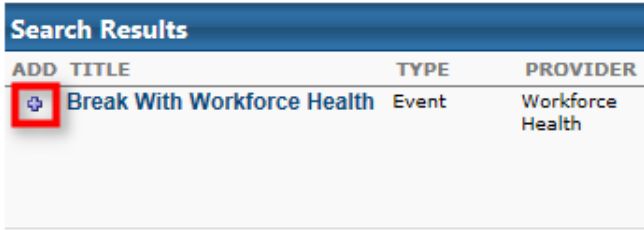
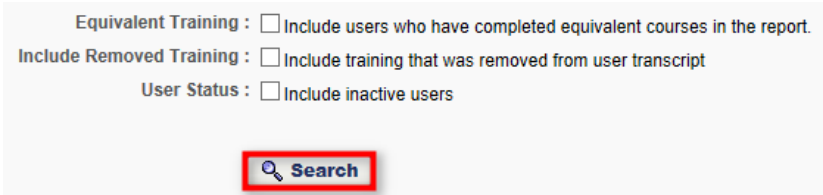


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Step	Action
3	<p>Depending on the report, you may have to configure several fields.</p> <div><p>Report Criteria</p><p>View training progress information for your subordinates. The date filters below refer to the date the training was requested/assigned. overview of all statuses, click on the "View All Statuses" link that appears in the detailed breakdown view</p><p>DATE CRITERIA</p><p>Date Criteria: Select From: 6/1/2015 To: 6/22/2015</p><p>ADVANCED CRITERIA</p><p>Training Type : <input checked="" type="checkbox"/> Online Class <input checked="" type="checkbox"/> Event <input checked="" type="checkbox"/> Quick Course <input checked="" type="checkbox"/> Curriculum <input checked="" type="checkbox"/> Test <input checked="" type="checkbox"/> Session <input checked="" type="checkbox"/> External Tr</p><p>Training Title : <input type="text"/></p><p>Options : <input checked="" type="checkbox"/> Hide Archived Training <input type="checkbox"/> Include Indirect Subordinates</p><p>Display : <input checked="" type="radio"/> All Training <input type="radio"/> Assigned Training</p><p>Equivalent Training : <input type="checkbox"/> Include users who have completed equivalent courses in the report.</p><p>Include Removed Training : <input type="checkbox"/> Include training that was removed from user transcript</p><p>User Status : <input type="checkbox"/> Include inactive users</p><p><input type="button" value="Search"/></p></div>
4	<p>If you see a button that looks like a small square pointing toward a larger square, click it to have a search window open.</p> <div><p>Training Type : <input checked="" type="checkbox"/> Online Class <input checked="" type="checkbox"/> Event <input checked="" type="checkbox"/> Quick Course <input checked="" type="checkbox"/> Curriculum <input checked="" type="checkbox"/> Test</p><p>Training Title : <input type="text"/></p><p>Options : <input checked="" type="checkbox"/> Hide Archived Training <input type="checkbox"/> Include Indirect Subordinates</p></div> <p>Note: You cannot type directly into this field before clicking the button. You must click the button to open the search window.</p>



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Step	Action
5	<p>Type the name of the training in the Search by Title or Keyword field and then click the Search button, or click the Search button to see all training options.</p> 
6	<p>Click the blue plus sign to the left of the title.</p> 
7	<p>Click the Search button.</p> 
8	<p>Finish filling in any fields, and then click the Search button.</p> <p>Result: The report will display.</p>